DOCUMENT RESUME

ED 334 686 EA 023 172

AUTHOR Peterson, Jack
TITLE How To Hire a Development Officer: From Defining Needs to Ensuring Successful Performance.
INSTITUTION National Catholic Educational Association, Washington, D.C.
REPORT NO ISBN-1-55833-052-6
PUB DATE 90
NOTE 68p.
AVAILABLE FROM Publications, National Catholic Educational Association, Suite 100, 1077 30th Street, N.W., Washington, DC 20007-3852 ($8.00 prepaid; add $3.00 postage and handling on billed orders).
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Catholic Schools; *Change Agents; Educational Change; *Educational Development; Elementary Secondary Education; Employment Interviews; Leadership Qualities; Personnel Needs; *Personnel Selection; *Private Schools; Program Development; Search Committees (Personnel)

ABSTRACT

This guide is designed to help administrators, search committee members, pastors, and school board members select a school development director. Chapter 1 describes why the hiring process is important. Chapter 2 answers questions such as who is responsible for development. Two styles of development management are described. Prerequisites for hiring are delineated in chapter 3. Directions for forming a search committee are provided in chapter 4. Chapters 5 and 6 describe what kinds of abilities, attributes, background, experience, and personality traits to look for in a development officer and how detailed a job description should be. Chapters 7 through 12 detail where to look for candidates; how to conduct initial screenings, interviews, and reference checks; and how to make a final decision, negotiate an arrangement, and present the new director to the community. Establishing internal accountability for the development process and ensuring growth for the director are described in chapters 13 and 14. Appendices A through E contain an adjusted hiring timeline, a "listening session" description, two sample job decriptions, a resume evaluation form, and an application form. (EJS)

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How to Hire a Development Officer

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How to Hire a Development Officer:

From Defining Needs to Ensuring Successful Performance

by Jack Peterson

National
Catholic
Educational
Association

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ISBN No. 1-55833-052-6

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About the Author

Jack Peterson has been the Vice-President for Development at Bellarmine Preparatory School in Tacoma, Washington since 1981. During that time, his office has conducted a $5.3 million Capital Campaign, and the Annual Giving Campaign has grown to $350,000 per year. Mr. Peterson has also headed up a project to establish a development consortium for the Catholic elementary schools of the area and he is past President of the Catholic Secondary School Development Directors Association (Western Washington). In addition to development, his office conducts a variety of special events and supports the public relations efforts of the school. Development efforts produce $1-1.5 million per year in unrestricted funds, capital funds and endowments.

Prior to his appointment at Bellarmine, Mr. Peterson worked in private business in sales, marketing, and operations management. He holds a degree in American Studies from Yale University.

Foreword

The fourth booklet in NCEA's new series on development for Catholic schools addresses the process of hiring a development director. In a clear, step-by-step approach, Mr. Jack Peterson has outlined the important considerations for schools as they search for the right person to assist them in reaching their development goals. Mr. Peterson convincingly proves that the time spent prior to the hire will be rewarded when the school ultimately finds a development director who is a perfect match for its unique situation.

As this booklet demonstrates, the process of hiring a development director is as critical a component of the development effort of a school as direct solicitation, marketing or student recruitment. By carefully assessing the proper fit between a development director and a school, both sides can contribute successfully to a comprehensive, collaborative development program.

I wish to thank the critical reviewers of this publication for all their efforts: Dr. Thomas S. Edwards, PhD and Rev. Joel M. Konzen, SM, both of the Secondary School Department at NCEA; Mr. Joseph T. Simonson, Director of Development, Department of Education, Diocese of Manchester, NH; and Sr. Kathleen Collins, SFCC, Assistant Executive Director, Elementary School Department at NCEA.

Mary V. Burke, SNJM
Secondary School Department

Acknowledgements

I would like to acknowledge the help of several people whose comments and editing were instrumental in preparing this publication: Fr. Van Hutton, SJ, School of Education, Seattle University; Justin I. Morrill, Development Director, Pierce County Association of Catholic Educators; Mary Peterson, teacher at St. Patrick School, Tacoma, Washington; and Lynne Hoffman, Director of Development, St. Charles School, Tacoma, Washington. A special acknowledgement goes to F. Leslie Cathersal, who over the last nine years has drawn upon his experience in personnel, marketing, fundraising, and non-profit governance to teach me most of the process outlined in these pages.

I. Introduction

Why the Hiring Process Is So Important

Anyone experienced in personnel management knows how costly it can be to hire the wrong person. The reward for inadequate hiring will be many painful hours covering for an employee whose skills and interests simply do not match the job for which he or she was hired.

Any school administrator will learn this lesson after only a brief time on the job. Yet it is remarkable how seldom the same administrator will invest the needed time and effort to assure a successful hire. Hiring decisions are nearly always made under strict time limitations, either real or perceived. If the school is hiring to replace a development officer who has left, there is rarely much notice given and the school feels constrained to hire someone soon to avoid a break in continuity. If, on the other hand, a new position is being created, the decision was probably long in coming, and the school begins the process feeling that the development officer should have been hired months ago. With this sort of pressure, it is understandable that those doing the hiring often feel that the quickest process is the best.

At times, search committees tend to gear the process so that within the time allotted, one candidate will look acceptable. The less involved the process, the more likely an acceptable-looking candidate will emerge. The process must be thorough enough to expose those gaps in skills, background and personality which will surely emerge once the person has been hired and the school is committed.

If this book is to help improve the hiring process, it must begin by convincing the reader that the time and effort invested in the process outlined will be paid back handsomely once the new hire is on the team. An extra hour of reviewing resumes, interviewing, or checking references, can save hours of compensation for an unsuitable development director, not to mention thousands of dollars in lost opportunities. While school administrators may feel that the hiring process is a

burdensome imposition on an already overburdened schedule and psyche, they know that the termination process is even more taxing.

The Purpose of This Book

This book was written to help administrators, search committee members, pastors and school board members select a development director. The basic process described has been and can be used to hire other employees, but this book has been specifically tailored to development in Catholic elementary and secondary schools.

Keep in mind when setting up the hiring process that it will be the first exposure the prospective development officer will have to the school. The school would do well, therefore, to treat the hiring process as the first phase of the new officer's orientation. Thought should be given to how the school is projecting both itself and its mission to the candidates. When the successful candidate is hired, he or she should already be initiated into the unique spirit of the school community.

There is another reason to take care in projecting who and what the school is to the candidates. The search process ideally should involve some self-selection by the candidates. Only if they have an accurate understanding of your school's mission can they decide whether their interests and abilities are suited to the position. Giving them the proper information to evaluate the match can be an important part of the process.

Another concomitant objective of the hiring process is to build support for the new development officer, and, if the position is new, for the development office itself. By involving in the selection process those on whom the development effort will depend, the school will already have capitalized on a key development opportunity.

The hiring process serves, therefore, not only to help the school evaluate candidates for the position, but to help candidates understand the school and to give them the best possible start in their new position.

How to Use This Book

This publication outlines a fairly specific process for hiring a development officer. The reader would do well to gain an understanding of the reasons for each step so that if it must be adapted to special circumstances, the basic purpose of the step will not be lost.

The hiring process has seven main objectives:

- clarifying the school's needs (Chapters II, III)
- forming a search committee and defining the search (Chapters IV, V)
- defining the development position (Chapter VI)
- creating a pool of applicants (Chapter VII)
- screening and evaluating candidates (Chapter VIII, IX)
- checking background (Chapter X)
- hiring and ensuring a successful start on the job (Chapters XI to XIV).

If any of these objectives are missed in the process, the school exposes itself to an unnecessary risk. This book therefore outlines steps which assure that each objective is achieved. In some cases, however, the school will have a time-frame which is too short to implement this entire process and which simply cannot be extended. Appendix A indicates how the process might be abbreviated.

II. What Is Development?

The term development has evolved over the last few decades to describe the full range of activities required to assure a school's continued vitality and growth. It is at once more descriptive and less widely understood than the term "fundraising." In some schools, the term "development" is giving way to "institutional advancement." This evolution from "fundraising" to "development" to "institutional advancement" evidences a tendency to view the development function in progressively broader terms.

For the purposes of this book, let us offer the following definition of development provided by the consulting firm Gonser Gerber Tinker Stuhr:

> the total effort on the part of the institution to analyze its educational or programmatic philosophy and activities, to crystalize its objectives, project them into the future, and take the necessary steps to realize them.

The development process begins with a clear understanding of the school's mission, expressed in some form of long-range plan, which is achieved by explicit development strategies and specific activities for gathering the needed resources. When used in the context of school development, resources include money, goodwill, labor, expert counsel, goods and services.

Who Is Responsible for Development?

Development takes place at every school, regardless of whether there is a development office or not. Establishing a development office per se is just one way to maintain and increase the vitality of a school. But assuring this vitality is always the responsibility of the school's chief administrator. In most cases, this person is the school principal, in some cases the president or headmaster, and in rare cases the pastor may see himself in this role. But whatever the title, the school's educational leader is also its chief development representative.

Many chief administrators have difficulty accepting this notion because so much is already expected of them. To add the often intimidating responsibility of development would be for them the straw, or rather the log, that breaks the camel's back. But if development begins with a clear understanding of the school's mission, who is the chief author of and spokesperson for that mission? Who has the greatest stake in the formation of a long-range plan? And who has the authority to manage a long-range planning process? These tasks ultimately belong to the chief administrator, who can and should enlist help, but who can never completely delegate the leadership to others.

As a school sets out to hire a development officer, especially if it has not had one before, it must remember that this person is hired to help the chief administrative officer in carrying out his or her development responsibilities. Schools that view development as solely the responsibility of the development director generally find that their development programs do not adequately reflect and are not sufficiently energized by the schools themselves. One result is that the programs are often ineffective. Secondly, the development officer, in an attempt to carry the school forward, may shape school directions according to dollar goals rather than by the goals of the short- and long-range plans.

The chief administrative officer is also indispensable to the development program as a solicitor. While he or she may not make every solicitation contact, certain major donors will require the school's top person to express personally why the school needs their help.

How Do You Know You Need a Development Officer?

Before the school commits to establishing a development office, it should have satisfied itself that a development office is really necessary. Even schools that are replacing a development officer should use the opportunity to evaluate whether a paid officer is required.

The first area to examine is how much long-range planning the school has done. The less the school knows of its long-range needs, the more difficult it will be to assess the task of the development officer. The less clear the task, the more difficult it is to identify the kind of person needed. The school may want to delay the hiring process until it has a clearer picture of its long-range needs.

If the school has a long-range plan in place, the goals which the school hopes to achieve in the next few years will indicate whether a development officer is necessary. The new monies sought by the plan should be at least three to four times the projected cost of the office over a five-year period. As an example, realistic minimum annual expenses for an office with part-time staff at the time of this publication would be $25,000 for personnel, equipment and supplies. Such an office, then, should look to return $75,000 to $100,000 annually. Offices with full-time personnel will generally require greater expenditures, but the three to four times return-to-cost ratio should still hold. If the program is beginning with no history and few records, the revenue goals will take, on the average, three to five years to achieve. The amount of revenue projected will indicate whether a part-time or full-time position is justified.

The next area to examine is the school's current development efforts. Many Catholic elementary and secondary schools have effective parent fundraising organizations. If the school lacks effective fundraisers, and those activities are perceived as most important, then the school should hire a special events coordinator, not a development director. Often, the school expects the professional development officer to assume responsibilities which were previously handled by parent volunteers. The school and its constituencies must understand that the development director's position is intended to bring the school to new frontiers, not to relieve seemingly weary volunteers. Development staff should be hired only if they will bring school development to annual and/or capital gift solicitation. And it must be made clear to all that the new officer will not be responsible for existing fundraising events, except as they coordinate with the school's overall development program.

What Is a Development Officer?

In general, a school about to hire a development officer is looking for the following:

> A development director is a paid staff person who advises the principal and, when appropriate, the governing board or pastor on gathering resources to advance the school's mission, and who, on behalf of the principal, develops and implements the strategies necessary to gather those resources.

The development director oversees and usually carries out the development activities required to achieve the goals of the school. But the development director also has the greatest stake, other than the principal, in seeing that these goals are adequately articulated and that a long-range plan or at least a planning process is in place.

Duties in two other areas are sometimes assigned to the development director: public relations or admissions and recruitment. Public relations is obviously a key component of the development process, so it is natural that the development officer be involved with this responsibility. But public relations is also a component of nearly every part of the school. For instance, the sports program may need to publicize an event. This is a public relations function, but it is not a development function. Is the development director to service such needs throughout the school? Is he or she to have public relations oversight in all aspects of the school? Such questions should be addressed before the director comes on board.

Admissions and recruitment of new students are aligned with development in that they account for tuition, the biggest portion of the school's revenue budget. But while recruitment requires some of the same marketing skills as development, it is also a distinct discipline. For example, the school must be concerned with the kinds of students it recruits and their impact on the entire school program, not just with the financial impact of their tuition payments.

In deciding what duties shall be assigned to the development director, the school must be clear what is a component of development itself and what is a related area which is assigned for circumstantial reasons. (For more information on this topic, refer to Anita Stangl's *The One-Person Development Office* [NCEA: 1990]).

Two Styles of Development Management

Another issue to consider in understanding development is management style. There are two common styles of development. The first is the out-front style in which the development officer becomes a visible symbol of the development effort itself. The development officer will cultivate personal relationships with donors and volunteers and become widely known. The officer can readily call on this network of personal contacts to accomplish the school's development objectives. Often, such a director personally makes most of the school's solicitation calls. The director functions as an outside salesperson for the school.

Contrasted with the out-front style is the behind-the-scenes approach. The behind-the-scenes development director is more of a facilitator who may not be personally well-known but who meets the school's funding objectives through the work of others. Such a development officer often does not make solicitation calls, preferring to find close associates of prospective donors to do the asking. This type of director functions more like a marketing manager for the school.

Each style has its advantages and disadvantages. The out-front director may be able to materialize support in short order but probably cannot cultivate the full support potential of the community. The behind-the-scenes director can leverage personal efforts by involving and supporting others, but may tend to lose touch with the solicitation process by becoming personally removed from it.

Some volunteers will appreciate the out-front development style, because it takes the pressure off of them, while others will appreciate the way the behind-the-scenes director makes them successful and lets them be involved.

The point here is not to recommend one over the other. Rather, the school should be aware of the advantages and disadvantages of each style. The search committee would do well to consider how the style of a new development officer might complement the style of their chief administrator: it is crucial that they do not conflict, and at the very least they must be compatible. Search committee members often visualize the development effort in one of the two modes, and the process will be strengthened if their visions are discussed explicitly. The goal is that whichever style is favored, successful candidates should exhibit the productive characteristics of that management style.

What Kind of Development Director Does Your School Need?

Development directors are not like journeyman carpenters: they do not come with a standardized set of skills. Nor are the development challenges for which they are hired uniform from school to school. So it is necessary for each school to have a good understanding of its specific needs before it decides to hire a development officer. What are the school's development goals? What other responsibilities will be assigned to the development director? What resources will the school commit to a development effort?

In answering these questions, the key person is the school's chief administrative officer who, prior to beginning the hiring process, must understand and define the position. The chief administrator must then seek the advice of and build consensus among the governing board, school staff, key volunteers, and the pastor. "Listening" sessions to poll the opinions of the broader constituency of individuals and groups connected with the school can be a valuable aid to the search committee in determining the final job description. (See Appendix B.) Although the chief administrator is ultimately responsible for the final job description, he or she must work in consultation with the search committee in developing the prerequisites for the position.

III. Prerequisites for Hiring

Your School's Unique Development Challenge

Each school's set of development needs and objectives is unique. While the school will want to emulate other successful programs, it must recognize points of difference by profiling its own distinct circumstances. The following are some key considerations in matching the development director to the school's specific needs:

- **The school's financial strength**

  Schools that face an imminent financial crisis will need development directors who can have an immediate impact. Without the luxury of time to learn on the job, they will have to be experienced. They must be more direct to gain control of the process in short order. Schools in this situation may see themselves as least able to afford a person with such experience. Yet without investment in a director who can galvanize immediate action, the school faces an even worse financial plight.

- **The social background of the school's constituency**

  The school leadership must evaluate the income level and consequent expectations of the people with whom the development director will be working. A school must be sure that its director's speech, manner of dress, and social ambience will not distance him or her from the people whose support the director is to enlist.

- **The scale of development**

  If the school is embarking on a multi-million dollar capital

campaign, it will eventually need more development staff. This means it must select a director who has the ability to hire and manage others. Someone who functions effectively in a one-person office may not be able to make the transition to managing a development staff. Additionally, some people have no problem asking for $100 gifts, but have great difficulty asking for $100,000. If the school's development needs will require gifts of $100,000 or $1,000,000, the development director must be able to ask for gifts in that range.

- **The school's development experience**

Will the new development officer have to train those working on development from scratch? If so, the school will need someone with the patience and ability to teach. If, on the other hand, volunteers and administrators are experienced in the solicitation of donors, the director should be flexible and knowledgeable enough to harness existing development skills and styles.

Structuring the Development Program

What follows cannot address the structuring of a development program in detail. Other NCEA publications provide ample treatment of specific program features. (See, for example, Anita Stangl's *The One-Person Development Office* and Sr. Mary Tracy's *Steps in Direct Solicitation* [NCEA: 1990]). Nevertheless, some general guidelines can be mentioned here:

- **Organization chart**

It should be clear where the development director fits into the school's organizational structure. Is the development director considered an administrator? To whom will he or she report? What will the director's relationship to other staff be? What authority will the director have in making decisions which affect other parts of the school (e.g., will sending a letter to parents via the students require prior permission from teachers or other administrators)? An organizational chart showing reporting relationships will help the search committee envision candidates associating with other staff. It will also be helpful in answering candidates' questions.

● **Development committee**

Does a development committee, blue ribbon committee, or development council already exist? Is it a committee of the governing board and does it have healthy representation from that group? If not, provision should be made for such a committee. It will serve as both an outreach into the support community and, as one of its most important responsibilities, as a vehicle to involve the governing group in development. The school should also use the job description to clarify the relationship of the director to this committee and to the governing group. Will the committee have authority to set development strategy or will it only advise the director? Or will its authority flow through the governing group? Ideally, the authority of the development committee flows through the governing group to the chief administrator who acts as the director's superior. But while the development director is strictly answerable only to the chief administrator, the development director should cultivate a close working relationship with the development committee and the governing group. This means being as responsive as possible to their direction.

● **Staffing**

The school should have some idea of the staffing which the development office will require. If the development director is to share staffing with other departments, it will be important to clarify job descriptions and reporting relationships. As a general rule, it is preferable to have separate staffing for the development office because of the responsiveness required, especially during development drives. To create strong staff loyalty, it is also preferable for the director to select his or her own staff, though this is seldom possible where an office is already established. Unless the development office already has an office manager or staff with strong organizational and clerical skills, the committee must find these skills in the new director.

● **Professional counsel**

Sometimes, a professional development consultant is retained to advise the school in the area of development. In some cases, it could be helpful for the school to use development counsel before it actually begins to hire a director and establish an office. Although such counsel is expensive, a skilled consultant can save the school thousands of dollars in false moves. If the school is already using a consultant whom

it trusts, the consultant should be involved in the hiring process and can be a great help in getting the new development director started. In fact, the presence of competent counsel can allow the search committee to select a candidate with less experience but stronger qualities in other areas, because the consultant can provide training after the hire. The key word here is competent. Consultants vary greatly in their abilities, and the school would do better to use its own judgment than to retain counsel in whom it is not truly confident.

- **Budget**

The new development director should be as involved as possible in drafting the development budget. However, if there are given budget constraints, they should be understood at the beginning of the hiring process. The candidates will probably inquire about budget, and the search committee will themselves want to know the school's budget capabilities when appraising the kind of director required.

- **Space**

The school should also give some thought to the location of the development office. There must be enough room to house files and equipment, as well as to support all the functions of the development office, including meetings and envelope-stuffing sessions. The location of the office in relation to other offices can also be an important issue. Will the director have close physical access to the chief administrator? Will the director be where he or she has contact with students and faculty as well as with parents visiting the school? It is preferable to have the director as close to the mainstream of the school as possible, but often when a new office is begun, the only space available is in the school's outer reaches. In such a case, the school should make plans to move the office closer as time allows.

Matching the Person to Your Team

After assessing the school's unique development needs and answering the key questions about the development structure, the school should then look at the team which the development director will be joining. The school must consider what kind of person will complement the skills and personalities already present in the school's leadership and staff.

Members of the search committee should reflect on the current school staff and visualize during the selection process what strengths each candidate might bring to that particular group of people.

IV. Forming a Search Committee

A search committee is an *ad hoc* team charged with the responsibility of identifying the most suitable candidate for a position. In some cases, the search committee will also make the hiring decision and negotiate the conditions of employment. In other cases, the search committee will simply recommend one or several candidates to the pastor, chief administrator, governing group, or a combination of these. The specific charge of the search committee will be based on the governance structure and style of the school. It is critical that key decision-makers in the governance structure be involved in the process.

How Many Members?

The size of the committee will vary according to the specific circumstances of the school. It is rare, however, that fewer than five will be able to represent the different constituencies or will possess the competencies required. On the other hand, if the committee grows larger than eight, it will become unwieldy. As anyone who schedules committee meetings knows, each increase in membership produces a geometric increase in scheduling conflicts.

Who Should Be on the Search Committee?

The school must decide what kind of skills and backgrounds it needs on the committee. The following are people whose skills and perspectives should be included whenever possible:

- **The future development officer's superior**

Some administrators prefer not to be involved in the search

process. They either feel it would absorb too much of their time or are afraid of affecting the committee's objectivity. The time invested by an administrator in the hiring process, however, will repay itself with dividends after the hire. Objectivity can be costly if it produces a development director with whom the chief administrator is not completely comfortable. While the administrator must avoid making the search committee a mere rubber stamp, he or she would do well to be actively involved in the search process at all stages.

● **Someone experienced with personnel**

When possible, it is helpful to have someone on the committee who is familiar with hiring processes and employment law. Like development, the personnel profession has its own wisdom and skills. While the school should not import the complexities of a large organization into its simpler environment, a personnel professional can make the committee aware of pertinent laws and helpful practices.

● **Key volunteers**

The search process is an opportunity to create support for the development officer eventually hired. Including two or three key volunteers on the committee will provide important data about the needs and expectations of the people the director will work with. It will also increase their confidence and sense of ownership. Such volunteers may be drawn from the school board, parish council, development committee, major donors or long-time advisors of the school. It is important that volunteers understand development and share the development goals of the school.

● **Another development professional**

Development professionals can bring realism to the process. Not only will they know the key attributes required for success, but they will be able to detect false indicators and guide the committee in setting its expectations appropriately. The development professional should ideally have a broad background in development, a record of success, and familiarity with the school and its specific development challenge.

Committee Process and Timeline

As soon as the search committee is formed, it should decide on its process and timeline. Below is a suggested outline of the steps to be taken by the committee, with an approximate time for completing each step. Time-frames shown are based on the number of working days remaining. A detailed explanation for each step in the outline is provided on the following pages.

	Time-frame (# working days remaining)	Step
Step 1.	57	Get input from constituencies
Step 2	52	Develop job description
Step 3	50	Advertise for candidates
Step 4	30	Screen resumes
Step 5	29	Send out application materials
Step 6	22	Check references (preliminary)
Step 7	19	Select interviewees
Step 8	14	Conduct first interviews
Step 9	12	Select finalists
Step 10	7	Conduct final interviews
Step 11	6	Make final reference checks
Step 12	3	Negotiate the contract
Step 13	0	Introduce your new development officer

Since there are 21 working days in the average month, the above schedule presumes nearly three months of activity by the search committee. Often the school will not perceive itself as having three months to work with. The school must balance any shortening of the process against the impact it will have on the quality of the result.

Even if the school is in a position to use the full three months, unanticipated problems may arise to prolong the process. The resume response may not yield enough viable candidates. Candidates may drop out or be eliminated in the final stages, leaving no prospects for the committee. Or events may occur in the life of the school or key search committee members which suspend the functioning of the committee. While these eventualities cannot be planned for, the committee should be prepared to adjust its processes. (For an adjusted timeline which still includes all the necessary steps, see Appendix A.)

V. What to Look for in a Development Officer

Previous sections focused on the school and how its needs indicate the sort of development office and development director the school should have. As it attends to developing a job description, the search committee should consider the characteristics of the director it seeks.

Abilities

Candidates should demonstrate the following abilities either in their resume or in their interview:

● **Oral and written communication skills**

Development directors must communicate often and in varied situations. They must speak to large groups and with individuals, run meetings, write brochure copy and newspaper articles, train volunteers, and either produce or commission design work. While candidates may not be equally strong in all areas, the more communication skills they evidence, the better job they will do.

● **Organizational skills**

Development is never a one-person operation. The development director's first task, therefore, is to involve others, and this requires organizational skills. Volunteers enjoy working on a campaign which has clear goals and clear,

disciplined steps to achieve them, because they know their individual efforts will translate into a successful result. Nothing is more wearying than a program which is poorly conceived or managed.

● **Planning skills**

The ability to plan, a part of organizing, is critical to development. The success of development is directly dependent on the existence of a coherent plan, both for the school and for the development effort. The development plan is the director's responsibility. If directors are to involve others in moving their school forward, they must provide an explicit road map to follow.

Although the school's long-range plan is the responsibility of the chief administrator and the governing group, the development director must be an insistent advocate of such planning.

● **Teaching and training skills**

Training, an important part of communication, is indispensable if the development effort is to grow and include an ever-widening circle of participants. Most people do not see development as their forte, but development directors who are patient, encouraging teachers can build a large circle of effective ambassadors and solicitors.

● **Time management skills**

Development directors must realize that time is not a renewable resource. They must use their own time wisely and respect the time of others. Directors who have not learned systems for scheduling their time effectively will find themselves reacting to crises rather than creating opportunities.

● **Computer literacy skills**

It is becoming more and more difficult to envision a well-run development office of any size which does not take advantage of the computer. While in-depth knowledge of computers is not necessary, the candidate who lacks at least minimal computer literacy will be unable to harness an important tool for word processing, planning, tracking pledges and managing prospect information.

● **Motivational skills**

When development directors can excite and inspire confi-

dence among the school's constituents, they begin to push their school to new heights. As they achieve, they gain further confidence in themselves and they achieve even more. This all begins with the ability of development directors to motivate first themselves, and then those around them, by example, realistic optimism, and by a vision of what the school can become.

● **Research skills**

As wealthy philanthropists and even smaller givers are besieged by more and more requests for support, the development effort must be better targeted to their interests. Prospect research, development's version of market research, reveals the giving ability, interest, influential contacts, and school connection of potential donors. Directors skilled in prospect research will more effectively use the time of all engaged in the process: volunteers, donors, and themselves.

Attributes

There are specific attributes required of a successful development officer for a Catholic school. The following are qualities which the search committee should look for when evaluating resumes and then verify during interviews and reference checks.

● **Attitude toward Catholic schools**

Active faith life: Since development officers are widely recognized spokespersons for the school, it is important that they reflect the school's commitment to spiritual growth in their own lives. This can be evidenced in a variety of ways, but a director who can not share in this key feature of the school's identity will have a difficult time representing its fundamental mission.

Working knowledge of the Catholic church: The person hired must have a special regard for the Catholic nature of the school and sufficient understanding of the Catholic church to respect and be supportive of its teachings, process and authority structure.

Understanding of Catholic education: Catholic schools have a remarkable history, a specifically God-centered purpose, and successful methodologies for achieving that purpose. It is often difficult for people familiar with only public education or even private education to quickly grasp the

profound characteristics of Catholic schools. Candidates who have worked in or attended Catholic schools, or those with children in Catholic school, will have an advantage in understanding the school they will represent.

● **Passion**

A characteristic common to successful development directors is a passion for the cause. Development, done properly, is demanding work. Unless directors draw strength from the mission of their school, they will not be able to motivate themselves or others sufficiently.

● **Hardworking**

Successful development capitalizes on opportunities. Opportunities do not work an eight-hour day, so a development director must be willing to work some long days to get the job done. Some people simply cannot maintain the pace required.

● **Goal-oriented**

While hard work is often necessary, even more important is the ability to keep track of the bottom line. Many task-oriented people are not able to prioritize. The development director able to ask for and receive a $10,000 donation once a week is more valuable than one who labors conscientiously 10 hours a day, but who fails to take the vital actions necessary to raise the money. While development generally requires both hard work and "smart" work, make sure the candidate knows the difference, and is capable of doing both.

● **Personal generosity**

It is difficult to ask others to do something we do not ourselves do. One of the best gauges of the candidates' sincere commitment to development is how much they give to philanthropic causes. Don't be afraid to ask them.

● **Self-starter**

The chief administrator, to whom the development director is usually answerable, often has neither the time nor the expertise to give the director a list of action steps to be accomplished each week. Consequently, the candidates must demonstrate the ability to identify goals and tasks and to accomplish them.

● **Comfortable with big dollar figures**

Occasionally candidates will show a great ability to organize and solicit gifts, but they may have dollar maximums beyond which they become unable to ask for donations. Fortunately, this maximum is pushed up over time as development directors challenge themselves, but the school would do well to find a development director who is already comfortable in the range required by its goals.

● **Polish**

Since a development director makes many contacts and strives to maximize the results of each, first impressions can be important. Resume presentation and interviews will tell a search committee whether candidates are capable of projecting positive, winning images of the school. One caution here, though: first appearances are not as important as an ability over the long run to build positive relationships with volunteers, donors and staff colleagues.

Background and Experience

To evaluate whether candidates have the attributes and abilities listed above, consider their activities and professional experience to date. It is important that claims made by the candidates be corroborated by specific examples from their personal histories. Certain types of work experience offer better preparation for development than others, and the presence or absence of this experience will be a good predictor of the candidate's chances for success in the position.

● **Development experience**

Clearly, the most valuable experience for a development officer is development itself. Many people are learning the language of development, but they lack specific experience in development. Lack of experience may be outweighed by other qualities, but the search committee must be warned against discounting the value of first-hand familiarity with development challenges. Development experience itself, though, is not a guarantee of the candidate's ability to do the job. The committee must verify that the experience is successful.

Unfortunately, most search committees will find a dearth of candidates with successful development experience, especially within the salary range they will normally be offering.

Most schools should prepare themselves to make difficult choices among candidates who have little or no direct experience in development. Given a choice between a candidate with experience but doubtful success, and a candidate with demonstrated success in a similar field such as sales or marketing, the school would do well to hire the latter. It is better to place the school's hopes in a person with untested promise than one with a demonstrated inability to succeed.

● **Other relevant work experience**

There are other fields which provide valuable experience and which are reliable indicators of development success. Candidates with successful sales experience will have learned how to be hardworking, goal-oriented, self-starting, and comfortable with big dollar figures. In addition, they will often be polished, know how to communicate (especially with personal persuasion), and how to handle being turned down without becoming discouraged.

The business success of some candidates will generally have required passion, organization, motivation, and training. Running a development office is similar to running a small business. Successful sales and entrepreneurial experience will be advantageous to the candidates.

Successful volunteer fundraising experience should also be considered in evaluating candidates. Such experience indicates the sincerity of the candidates' desire to work in development. Sensitivity to the volunteer's perspective will be valuable to the development officer.

When reviewing work experience, the search committee should look to see if the candidate has demonstrated any of the following skills in previous positions:

Leadership: In their past involvements did the candidates emerge as leaders or were they just participants? The school cannot afford to hire a mere participant in the development process. It requires a leader.

Personnel management: Did the candidates manage people in their previous positions? If this position is the first personnel management position they will hold, or if their background shows they have avoided situations where their success depended on managing others, they may have a difficult time as a development director. If they have managed people, management style and decision-making style are important to evaluate.

Ability to organize and conclude a project successfully: Much of development is project-oriented. The development officer must first identify needs and opportunities and develop a strategy to address them, then enlist workers and marshal resources, and finally lead the effort to completion. The search committee must determine which candidates have directed projects from conception to completion.

Personality

The search committee does well to assess the personality style of the candidates and then to evaluate how they have used their styles to achieve positive results.

One of the features of development work is that results can be measured. If the dollars are not coming in, then the program and the development officer are not successful. There may be extenuating circumstances over a short period of time, but under ordinary conditions, the development director must demonstrate successful achievement of goals. Thus, if applicants previously engaged in development cannot show examples of results they have produced, the school takes considerable risk in placing its future in their hands, regardless of how pleasing their personalities may be.

Likewise, the temptation is sometimes present to hire newcomers to development primarily on the basis of personality. While the committee should not ignore the affability of a potential director, it ought not lose sight of evaluating each candidate's accomplishments.

VI. Developing the Job Description

A written job description performs several functions. It ensures consensus among search committee members about the kind of person being sought. It gives applicants a more detailed understanding of the position. And it can be a tool for building appropriate expectations of the development director among the school's constituencies. How well it serves each of these functions depends on the process used to produce it.

How Detailed Should the Job Description Be?

● The dangers of too little detail

Many unacceptable candidates will eliminate themselves if they have a clear understanding of the job in the beginning. This can save the committee much time and heartache. Nothing is more frustrating than having attractive candidates discover late in the process that the salary range is not even close to being acceptable, or that they will have responsibilities with which they are simply not comfortable. The job description should give a clear picture of the position so that candidates can decide if they are suitable for the position.

Too little detail can also leave the development officer and the school vulnerable to inappropriate expectations. The sooner and more clearly the school articulates realistic expectations of the development director, the more likely the success of the development program becomes.

● The dangers of too much detail

Too much detail can intimidate even qualified candidates, especially if the job description becomes a holding tank for

everyone's agenda for the development office. While these hopes should be heard, the committee has a responsibility to help the chief administrator reduce them to a coherent and realistic job description.

Two sample job descriptions appear in Appendix C. Remember that the contents and level of detail will vary with the situation, but a good rule of thumb is this: base the complexity of the description on the inherent complexity of the position; simplify it by focusing on prioritized expectations.

● **Reviewing the job description with those in authority**

Although the chief administrator of the school ultimately is responsible for writing the final job description, it will be wise to review that job description with individuals or groups in the governance structure of the school before it is finalized. These include the pastor, if he is not on the search committee, the governing group and possibly the parish council.

VII. Where to Look for Candidates

The candidate selected by the search committee can come only from those who apply. There is, therefore, a direct correlation between the number of qualified candidates who apply and the quality of the development officer hired. How and to whom the search committee publicizes the opening becomes another factor in the success of the hiring process.

The Option of Hiring from Within

In many schools, a substantial number of development positions are filled by individuals who are already working for the school. Because many of these people come from backgrounds other than development, it is wise to consider the pros and cons of hiring from within.

- **Teachers**

Teachers will generally have an understanding of the school and a passion for its mission, both of which the job requires. Some may even have had the chance to work part-time in development, so that the school and the teacher may be able to determine whether the teacher is suited for the job. But in the absence of such experience, the school should not move someone from teaching directly into development, unless that person has evidenced the same skills and experience the school would expect of someone coming from the outside.

● **Office staff**

Before the development office is launched, it is common for someone on the office staff to be handling some development duties part- or full-time. Again, the skills and disciplines required for development differ substantially from those required for clerical work or even office management. The school should not assume that someone who has worked well in a support role can automatically make the transition to development leadership.

● **Volunteers**

The other common promotion from within is that of a volunteer who has worked closely with the school's development effort. The volunteer will likely have a passion for the school, an appreciation for the volunteers' perspective, and some valuable fundraising experience. What the volunteer will generally lack is a broad knowledge of the contemporary development process. The transition from chairing an auction to managing a multi-faceted development program can be deceptively difficult.

While none of these internal sources of candidates should be excluded, and some should even be encouraged to apply, it is strongly urged that the school not forgo the search process and simply move someone into the director's position. This is especially true where a new position is being created, because the internally promoted incumbent will have no existing model to follow. If at all possible, the school should structure the search process to include, but not limit itself to, such candidates.

Where to Publicize

How does the school reach qualified candidates to encourage them to apply? The following are suggested as cost-effective vehicles:

● **Classified ads in newspapers**

The want-ads are relatively inexpensive and reach many job seekers. They will create a large pool of resumes. Unfortunately, the majority of these applicants will not be sufficiently qualified even to be considered. But the cost of

such ads is low, the resumes of the unqualified can be quickly culled, and there will be at least a few gems among the respondents.

Schools in smaller towns should advertise in the papers of nearby cities. Ads should be placed in the local diocesan newspaper and those of nearby dioceses as well. Schools should also consider advertising in national Catholic publications such as the *National Catholic Reporter* and national professional publications. Remember that such publications have early deadlines, so the committee must plan ahead. Remember also that national advertising will bring resumes from distant locations. The committee must decide whether it will fund transportation to interviews and, if it does hire someone from outside the area, moving costs.

Below is a sample ad which can be modified to run in all publications. For classified ads in metropolitan newspapers, a simplified version should be used.

> Local Catholic elementary school seeks qualified applicants for the position of Director of Development. The successful candidate will possess experience in fundraising (related experience may be substituted), preferably successful experience in directing annual giving and special gifts programs and a working knowledge of public relations. Familiarity with the Catholic church and Catholic education is highly preferred. Competitive salary, DOE, good benefits. EOE. Complete resume to Search Committee, St. Ubique School, 123 N. Ash, Collegetown, WA 91234.

● Professional associations

Most professional associations have newsletters, bulletin boards or referral lists to advertise job openings. These are an inexpensive, well-targeted way of reaching development professionals and aspiring development professionals. If no one on the committee is familiar with the development associations active in the local area, phone calls to other professionals will provide the information. Professional associations' job services work with long lead times, so contact them as early as possible.

● Other development offices

The committee should send a letter describing the position and the school to local development professionals known to be successful. The letter will make them aware of the position, highlight its attractive features, and ask if they know of a

candidate they would recommend. They may be aware of a colleague who would be interested or even have someone in their own office who is ready to move up but can do so only by moving out. Or they may themselves be interested in the position. The school will have made the opportunity known to them without actively recruiting them away from their current employer.

VIII. Initial Screening of Candidates

If there are not enough resumes to generate three to five qualified candidates, the committee must readvertise the position. However, if the response is acceptable, the committee can begin screening resumes. The objective at this point is to eliminate those who lack the minimum qualifications for the job and identify the leading candidates who exhibit the attributes described earlier.

Evaluating Resumes

The first step is to review the resumes of respondents. This task can be performed by the entire committee, but if the committee or the applicant pool is large, it must be reduced by some pre-screening. Make photocopies of all the resumes and make them available to all members of the screening committee before their regular meeting.

By drawing up a simple evaluation chart (shown in Appendix D) before the resumes are read, the committee can decide on five to eight key criteria for evaluating candidates. Be sure to include a catch-all criterion, such as "Can this person do the job?" These criteria are then inserted across the top of the chart and the candidates' names are listed down the left side. Each member of the committee is given a copy of the chart and the resumes, and is asked to rate the candidate on a scale of one to five (five being highest) in each category.

Delegates from the committee can total the scores for each candidate and present the results to the committee as a whole. The committee can then discuss any sharp variations in the ratings for candidates, in case one of the committee members missed or misinterpreted some important information. Once the committee is satisfied with the ratings, it identifies the top candidates to be included in the next step of the process. The

ideal is to have about 10 candidates to consider further.

The Application Process

It is surprising how often committees treat resumes as synonymous with applications. A resume is a free-form document which allows candidates to include or exclude information as it affects the strength of their candidacy. Because the candidates have so much control over their resume, they can hide as much as they reveal. So it is critical that candidates also be required to complete an application form.

A sample application form appears in Appendix E. A few of the salient features should be highlighted.

1. Ask for a phone number where the candidate can be contacted.
2. In the "Work Experience" section, ask for supervisors' names to call for references, for applicant's salary for reference in later negotiations, and applicant's reasons for leaving each position.
3. Include open-ended questions about experience and reasons for applying.
4. Ask for physical or mental health limitations which could affect the applicant's ability to do the job.
5. Ask about any convictions or legal findings which would relate to the person's fitness to do the job (including problems which could expose the school's students to child abuse). Some states require that schools have new employees sign waivers to allow a police background check. The school does not want any surprises in this area.
6. Include a statement about the expectations of employees to live a lifestyle compatible with the school's moral teachings.
7. Include a blanket waiver to allow the school to contact references not specifically mentioned by the applicant.

In addition, it is valuable to require two one-page essays from the applicant. The first is an answer to a question such as "Why I want to work for St. [Name] School" or "Why I would like to work on behalf of Catholic education." This will not only reveal the depth of commitment and passion for the mission of Catholic schools, but will give the committee an idea of the applicant's writing ability.

The second is either a sample script for an Annual Giving

phonathon or a sample solicitation letter. This will tell the committee how much the applicant knows about the process of asking for money and will validate claims of experience with annual giving or donor solicitation.

When the application materials are sent to the candidates, the letter accompanying them must tell the candidates that they have been selected to apply because the committee was impressed by their resume and wanted to know more about them. Some applicants will be unwilling to invest the time needed for this application process, but serious candidates will be impressed by the school's desire to know more about them and its commitment to do its job thoroughly.

Also accompanying the application materials should be a more detailed job description such as that in Appendix C, and a mission statement or general brochure describing the school. These allow the candidates to better evaluate for themselves whether they are a good match for the job.

IX. Interviewing Candidates

If 10 or so candidates have been sent application materials, five to seven will usually continue their candidacy by completing them.

The committee will need to decide whether to interview respondents before selecting finalists or to select finalists based on only the applications. It is strongly recommended that before anyone is hired, the finalists be interviewed more than once. Interviews on different days will reduce the chance of projecting an inaccurate impression. Conducting the first interview at this stage will be helpful in the process of screening candidates who returned the application materials.

Preliminary reference checks may also be helpful in screening application respondents, although this step can be postponed at the discretion of the committee. Initial reference checks and the initial interviews can be conducted by a few delegates of the committee, rather than the entire committee.

First Interviews

If applicants are to be given preliminary interviews, it may not be logistically possible for the entire committee to conduct the interviews. In such a case, a subcommittee of approximately one half of the committee can conduct screening interviews. The subcommittee should, however, consist of more than just the pastor and the chief administrator. As soon as these interviews are completed, the interviewers should meet to select the candidates for the final interviews.

Group Interviews

It is preferable, especially for the final interviews, that each candidate be interviewed by the entire search committee as a group. Interviews by a group allow interviewers to see how candidates respond to questions and personalities other than their own. The group interview is more stressful for the candidate, so the committee should begin by putting the interviewee at ease.

Questioners should have some questions prepared in advance but should adapt or add to them as the interview progresses. Especially at the beginning, it is important that each committee member be given equal opportunity to ask questions. In order to make the comparisons between candidates more meaningful, the committee should try to identify in advance a few key questions to ask of each interviewee.

In group interviews, the committee chair must manage the process and keep track of time, making sure that all committee members get a chance to ask questions. It is also helpful to give the candidate an opportunity to ask questions or make a statement at the end.

What Questions to Ask

The questions put to the applicants are best determined by the circumstances of the school and the perceived strengths and weaknesses of the applicants. Committee members should all have reviewed the interviewees' resumes and application forms as well as the two writing samples. The interviewers should ask questions about any gaps in the job history, clarify actual duties and achievements in past positions, clarify reasons for leaving, and have the applicant expand orally upon written answers to application questions.

The interview should also include what-if questions such as "What would you do if board members were reluctant to make solicitation calls?" and even role-playing (a sample solicitation) in order to evaluate how applicants would respond in real-life situations.

The committee should ask direct questions about lifestyle and religious practice to the extent that they are job-related. For other employers such questions are rarely job-related, but for a Catholic school they can be essential. Nevertheless, caution should be exercised in seeking information that may unfairly prejudice the committee.

Other questions that might be asked in the interview:

What do you see yourself doing in five years? 10 years?
What do you see as your greatest strengths? Weaknesses?
What do you think will be your favorite part of this job?
What kind of people bother you the most?
What accomplishment are you most proud of?
If you only knew Mrs. Dylan's address, year of graduation, and giving history of $125 per year for two years, how would you research more information about her?
After reading our school's mission statement, how do you see yourself contributing to that mission?
We expect all adults in this school to be role models of Christian values. Describe how this would apply to you and what students might learn from your example.

In general, questions should be open-ended, requiring more than a "yes" or "no" reply. For example, instead of, "Do you volunteer for fundraising projects?" the committee should ask, "What fundraising activities do you volunteer for?" Then follow up with a "Why?" or "Why not?"

The committee must expose weaknesses as well as strengths. Presumably the candidates will adequately present their strengths, so the committee must be responsible for finding those attributes which could cause problems after the hire. While making every effort to put the interviewee at ease, make sure that potential weaknesses are directly addressed. Sometimes, in order to avoid awkward situations or to preserve the committee's own confidence in a candidate, important questions will not be asked or vague answers will be accepted. This does an injustice to the school and the applicant, both of whose future well-being depend on the committee's ability to match the person to the position.

Evaluating the Interviews

After the interviews are completed, the committee can discuss the interviews using the same form as that used in the initial screening (see Appendix D). The committee may wish to change the evaluation criteria across the top of the form based on their growing understanding of the job and the candidates.

Neither general impressions nor specific facts should be ignored. In evaluating candidates, committee members should give heed to their feelings and impressions, but they should also search for examples and specifics which ground their instinctive responses.

After the preliminary interviews, the committee should narrow the finalists to two or three. After the final interviews, if references have been thoroughly checked, the committee is ready to make its recommendation. If references have not been checked, the process described in the following section must be followed before the committee's choice is finalized.

X. Checking References

Checking references is among the most important steps in the hiring process because it is the only way to learn how the candidates really perform in job situations. Because of the increasing complexity of employment law and the reluctance of employers to expose themselves to libel suits, however, it is becoming more difficult to check references. For both these reasons, it is important that the committee study carefully the process outlined in this section.

● **The legal environment**

The school has no right to seek references from anyone without the permission of the applicant. Job applicants have a right to their privacy and may have good reasons for not wanting a particular individual contacted. For instance, if they are applying for a position without the knowledge of their current employer, it could be disastrous if that employer were contacted. Once the applicants give permission, however, the school is free to make contact. When permission is denied, the school is free to ask the reason for denial. The reason given will generally indicate whether there is cause for concern.

The references listed by the applicants on their resumes and the application form will be hand-picked to present only the strengths of the applicants. "Personal references" are generally not valuable, unless they are people known to the school or committee members, because they will merely be advocates for the applicant and seldom have job-related knowledge. It is best to contact people who have supervised the applicant.

Even for job references, it is helpful to call people other than those listed by the applicant. The school can do this in

one of two ways. It can interview those listed and ask for others who might have a different perspective on the applicant. Or it can call former employers who are not listed as references. Before it contacts these individuals, however, the school must obtain the applicant's permission. This can be done either by recontacting the applicant and asking for permission, or by including a general waiver on the signed application form (see Appendix E).

The school must also be aware that the individual providing the reference may legally answer only direct questions. Most people asked for references do not realize this, and will try to provide any information helpful in evaluating the applicant's qualifications. But the person calling for the reference cannot assume that the person being called will provide all the needed information unless direct questions are asked.

Third, the questions asked must relate to the job for which the candidate is applying. Questions about race, age, sex, marital status, family or social background, particularly, expose the school to charges of discrimination from applicants who are not hired.

In general, the key word to satisfying the law when hiring is "job-related". What is job-related is being redefined with each new court case, and what for some employers may not be job-related, such as religious beliefs and lifestyle, will be relevant for a Catholic school. But the committee would do well to satisfy itself that it can defend its inquiries on applications, in interviews and in reference checking as job-related. If the school has questions in this area, it should consult an attorney with expertise in employment law.

● **Who should check references**

If the committee is checking references to help screen those who return the application materials, the job will probably have to be divided among all the committee members. Reference checking, either before or after the final interviews, can be done by one or two individuals. Having more than one committee member checking references for each finalist will broaden the perspective on each candidate but it also runs the risk of producing an inconsistent picture of experience and attributes.

● **Ensuring candor**

For the references to be of any value, they must be honest.

Yet it is often difficult for friends or former associates of the applicants to bring up weaknesses, even when they know they exist. The committee members themselves are at times reluctant to ask probing questions and uncover problems, especially if they are hoping to confirm their own positive judgment of a candidate.

The person calling for references must therefore make sure that these tendencies do not frustrate the gathering of legitimate information. It is a good idea to begin the conversation by establishing rapport with the person giving the reference. The committee member should describe the job and the school and explain how important it is to the school and the applicant that they be well-matched. If this is explained, the person giving the reference will want to avoid leading the school or the applicant into a detrimental decision by giving less than candid responses.

● **What questions to ask**

As with the interviews, the committee members must design reference questions based on the specific job and what they have learned or not learned about the applicant. The committee members checking references should note any potential weaknesses or concerns suggested by the resumes, application materials and interviews, and prepare direct questions which will shed light on those concerns.

Sample reference checking questions:

Why did the applicant leave the position?

What strengths does the applicant possess which would be relevant to this job? Weaknesses?

With what kind of people did the applicant work best? Have the most difficulty?

Does the applicant have any substance abuse or personal problems which could affect job performance?

Describe a specific event which illustrates the character and abilities of the applicant.

Questions about attributes that the committee feels are most important should also be asked. Again, the person checking references should design questions to be open-ended, rather than "yes-or-no". Listen for hesitation or other signals that there may be something behind the reply.

XI. Making the Final Decision and Negotiating the Arrangement

If at this point the committee is fortunate to have more than one excellent candidate, the final choice will not be an easy one. The committee should take time to discuss the positives and negatives revealed about each candidate in their resumes, applications, interviews, and reference checks. The committee can use the same evaluation form used before (see Appendix D). This form can be adjusted based on the characteristics the committee now feels are most important.

After the school has decided on its top candidate, the process changes direction. Up to this point, the candidates have been selling themselves to the school. Once the school knows whom it wants, it must sell itself and bring its candidate on board. If the search committee has conducted a thorough and fair process, and if they have taken the steps outlined earlier to explain the school mission, much of the selling has already been done.

The chief administrator should contact the leading candidate and arrange a meeting before the runners-up have been informed. The administrator should inform the candidate that he or she is the committee's top choice and that they would like to meet to settle the details of employment. The administrator should communicate how excited the school is, but also suggest that it is important to clarify expectations and

answer any outstanding questions.

At the meeting, the chief administrator must be prepared to negotiate salary and benefits. He or she should be able to answer any questions about benefit plans. Some of these will be non-negotiable. But for those which are negotiable, such as salary and vacations, the administrator must know what are the parameters within which the school can work.

As with any negotiation, the chief administrator must begin by offering what it considers to be the terms most desirable for the school. If these are not acceptable, the candidate will respond with alternate terms. By going back and forth, both parties will agree on acceptable terms and feel they have negotiated the most favorable terms possible.

Once the compensation issues are decided upon, the chief administrator and the candidate should review the job description, discussing each party's interpretations and expectations. If substantial points need to be clarified, the administrator can write up any additions or changes needed for the job description. This can be submitted at a later date and need not delay concluding the hire.

Some schools and dioceses require the signing of a contract. Preferably a contract would not be used, but rather a simple written statement for the new development officer indicating date of hire, title, and salary and benefit description, including vacation days. Both parties should sign the statement. Any employee handbook or other written description outlining employee policies and procedures for the school should also be made available to the new development director at the time of hire.

When the candidate has accepted the job and all major issues have been resolved, the other candidates can be contacted. It is best to contact finalists by phone, even though it is emotionally difficult to experience their disappointment. The personal contact helps them feel better about themselves and the school. If they want to know why they were not hired, it is best to say that it was a difficult choice but that the winning candidate simply had more experience. All other candidates can be informed by letter.

If the top candidate does not accept the job, the search committee or principal can then contact the first alternate and enter into the negotiating process described above. Since alternates were not contacted prior to this point, they need not know that they were not the first choice.

XII. Presenting the New Development Officer to the Community

An underlying principle of the process described in this publication is that the hiring of a development officer is itself a unique development opportunity. After the final decision has been made and an agreement signed, the school must be prepared to draw maximum benefit from the announcement of the new appointment.

The first task of the newly hired officer should be to prepare, or at least supply information for, a press release. This should include a high-quality recent photo and any background information which will create high regard for and personal interest in the new director. The release and photo are then sent to all local newspapers, including business publications and appropriate community newsletters. The school's own newsletters should all include the announcement, picture, and a story with a strong human interest angle.

The purpose of all this publicity is not only to give the school additional press coverage, but to endorse the new hire and provide as much name recognition as possible. The program will have a faster start if prospective donors know something of the new director before they receive the first call for an appointment.

The press release should also be adapted as a letter sent to key supporters of the school, including donors, volunteers, employees and local church officials. Such notification makes a strong statement to the recipients about their importance to the school, and it will assure their awareness of the hiring if they missed it in the press.

If the school has an established development program, the chief administrator and the development committee (or, in the absence of a development committee, the governing group) should select 10 to 30 key supporters and potential supporters for the new officer to visit as soon as possible. The purpose of these visits is not only to introduce the new director but also for the director to learn the key supporters' perceptions and expectations of the school's development program.

The principal or a committee member can accompany the development director on these visits, but it is preferable that they simply call and ask the supporter to meet the new director and then let the director make the appointment and visit alone. This is done for two reasons. First, the new director begins to build a personal relationship with key supporters instead of relying solely on relationships through others. Second, using the advantage of newness to the job, the director will receive a more candid assessment of the school and its development program.

It will be helpful for the new director to prepare a list of questions to ask of these top supporters. Not only can the responses then be compiled into a report on the perceptions of the school by its key supporters, but the supporters will be encouraged by having their input sought. They will also be less reluctant to respond to a survey they know others will be responding to as well. The director should be flexible in conducting the interview. If the constituents digress in their responses, the director should remember that what these supporters want to talk about is more important than the questions themselves.

There is no better time for such an introduction/data-gathering process than at the beginning of the development director's tenure. After a year on board, it will be much more difficult to elicit candid responses or to build relationships. The development director will find that those relationships cultivated in the first few weeks on the job will often be the

most important even years later. The school should use this opportunity to bond the new director to the right people in the beginning.

In writing press releases, making announcements to various constituencies, and arranging meetings with key supporters, the school should also think about setting appropriate expectations of the development office. While disseminating information about the development director, the school should say something about the directions of the development effort itself. Drawing on the school's mission statement, long-range plan, and the development director's job description, each announcement should highlight the two or three most important goals of the program. This will begin to orient constituencies toward achieving those goals and head off any special agendas which may otherwise develop among various constituencies.

XIII
Establishing Accountability

While the hiring process itself is concluded once the development officer is introduced to the community, the ongoing relationship between the school and the new development director began its formation during the hiring process. The school will want to further clarify that relationship by establishing internal accountability for the development process.

Reporting Relationships and Intervals

The job description should spell out to whom the development director will report. In most cases, the director should report directly to the chief administrative officer of the school. Since the chief administrator has the primary responsibility and authority for development of the school, he or she must directly supervise the person hired to coordinate the development process. The development director will want to follow the advice and direction given by the development committee or the governing group, but that does not supplant the supervisory role of the chief administrator.

While the reporting relationship of the development director to the chief administrator may be clear, the means for maintaining that relationship are less so. It is important, therefore, that the administrator set up a weekly meeting to strengthen that relationship.

When they meet, the development director should report major activities, explain priorities being pursued, and discuss how time and resources are being expended. This gives the administrator the opportunity to adjust development priori-

ties if they do not reflect the school's overall needs. The administrator will also learn what actions he or she must take to support the development program. The development director must help the administrator determine which constituents or situations require his or her personal involvement.

In addition to weekly progress meetings, the principal must schedule monthly or quarterly meetings to set goals with the development director. Not only does the chief administrator clarify school and development goals, but he or she should also help the development officer establish personal goals.

Finally, the chief administrator must review the development director's performance at least annually. Most directors will consider it helpful to have monthly feedback on their performance, but a comprehensive written review should also be conducted.

XIV. Ensuring Growth for the Development Director

The other ongoing commitment to the development officer which should be anticipated during the hiring process is the need for continuing professional education. Any development officer will benefit from conferences and seminars about development methods, but the less experience he or she begins with, the more continuing education will be required. Often the new hire will be reluctant to request funding for conferences, so the school should take the initiative to make funding available for such workshops. The cost of this education should be taken into account when discussing the development office budget and in setting salary levels.

● **Professional Associations**

The are a number of organizations which address development issues either exclusively or as part of their overall service to members. These organizations provide classes, workshops, conferences, publications and the opportunity to create networking relationships with other development professionals. Examples include:

The National Catholic Educational Association
The Council for the Advancement and Support of Education
The National Society of Fund Raising Executives

In addition, the school can affiliate with regional associations in the school's local area. There may be a formal or informal association of development officers from the Catholic schools in the diocese or deanery. If one does not already exist, the development officer might help to organize one.

While it would be financially prohibitive to belong to all possible organizations, the development officer and the principal should evaluate which one or two merit the school's involvement.

● **Independent seminars and training programs**

Development training programs are also offered by various universities, institutes, and consultants around the nation. Non-members can generally attend seminars and workshops offered by the professional associations by paying a higher, non-member fee.

At all levels, care should be taken to ensure that the school's resources are invested wisely. Make sure the program faculty are knowledgeable and experienced professionals and that the sponsoring group has a reputation for quality workshop presentation.

● **Community involvements**

Volunteering for one's high school or college phonathon or for the local YMCA annual development drive will help sensitize the development officer to the volunteer's perspective. In addition, such experience exposes him or her to new development methods, broadens the officer's network of community contacts, assists another important cause, and ultimately reflects positively on the school itself.

XV. Conclusion

The hiring process is the crucial first step in getting started or moving forward in development. A successful process requires the exercise of common sense and the application of a few guiding principles:

- Allot the time necessary to do the best job possible.
- Generate a large pool of qualified applicants.
- Evaluate the candidates from as many angles as possible.
- Don't be afraid to look for weaknesses.
- Remember that development is measured by results. While style and personality should be considered, in the end the ability to produce results is what really matters.
- Use the hiring process to involve key people in the development process of the school.

Finally, remember that hiring only begins the process of acquiring a great development officer. The ultimate success will depend on the ongoing supervision and professional growth experienced during the development officer's tenure at the school.

Appendices

Appendix A: Adjusted Hiring Timeline

In cases where the school simply does not have three months to work with, the following strategy might be followed:

Hiring Timeline

	Step
Steps 1-3	Get input from constituencies
	Develop job description
	Advertise for candidates
Step 4	Screen resumes
Steps 5-7	Send out application materials
	Check references (preliminary)
	Select interviewees
Step 8	Conduct first interviews
Step 9	Select finalists
Step 10	Conduct final interviews
Step 11	Make final reference checks
Step 12	Negotiate the contract
Step 13	Introduce your new development officer

By combining steps as indicated above, the search committee may be able to condense the normal three month schedule. The period for receiving resumes is the longest stretch of time. The committee could place a fairly general ad to begin attracting resumes, and work on getting input from constituencies and formulating the job description during the first two weeks of this period. This would save seven working days without skipping important steps.

If the resume response is small (fewer than 20), the interviewees for Step 8 can be selected from resumes and contacted on the same day they would be sent application materials to be returned prior to the interviews. While this makes it harder to determine who are the best candidates for interviewing, it will save ten working days.

The reference checks called for in Step 6 are not critical. They may be helpful in selecting preliminary interviewees, but if the calendar or the schedules of committee members are restrictive, this step can be dropped. Do not, however, hire a development officer without thoroughly checking references at a later point.

Appendix B: "Listening" Sessions

The search process itself is a great development opportunity. Consider this simple logic:

1) Those responsible for hiring an employee have a vested interest in the employee's success.

2) Development officers succeed to the extent that they can enlist the labor and generosity of the school's constituencies.

3) If these constituencies feel they helped to hire the development officer, they are more likely to work for the success of the development program.

Though it takes time and effort, the school will be rewarded for conducting listening sessions to involve its broader constituencies. These sessions are simply forums to allow those with an interest in the school to express their feelings about the school, its current development processes, what they would expect from the development program, and what they would expect of a development officer.

The forums can be conducted by a subcommittee or an individual delegated by the search committee. Techniques vary, but the comments of the participants should be recorded and, if possible, even prioritized at the end of each session by those present. This information is then summarized for the chief administrator.

Key groups to be involved in such a process, either together or in separate meetings, are:

Governing Group
Faculty
Parish Council
Parents Club
Major Donors

If these groups cannot be included in forums, their input can be obtained by questionnaires administered at their regular meetings or by telephone or mail.

Not only will participants experience an increased commitment to the development effort and the officer who is hired, but the chief administrator will have data helpful in putting together the job description. The expectations expressed by these constituencies should not automatically be included in the job description. Rather, the chief administrator filters them with his/her more expert judgment to produce a job description reflecting the aspirations of the school community, the financial needs of the school, and the history, or lack of history, of development in the school.

The final advantage of the listening sessions is that they will produce a helpful body of data for the newly hired development officer. He or she will want to learn quickly what the school's community expects of the development effort, and having such information during the start-up will be invaluable.

Appendix C: Job Description

Sample #1

St. Ubique School
Director of Development

General: A newly established, full-time, permanent position to provide professional development leadership to a Catholic elementary school of 345 students.

Responsibilities:

1. Plan, prepare materials for, recruit volunteers for, and conduct annual giving, including mail, phone and direct solicitation.
2. Work with the principal, board, and development committee to prepare development plans.
3. Cultivate the support of the school's various constituencies.
4. Solicit gifts and manage the solicitation of gifts from individuals, corporations, and foundations.
5. Advise the principal about and help carry out public relations and marketing efforts.
6. Supervise secretary and volunteers.
7. Oversee the gift tracking and acknowledgement system.
8. Prepare and work within an office budget.

Requirements:

1. Four years experience in fundraising or experience in fundraising as well as experience in sales or marketing.
2. Successful experience running an annual giving program and special gifts program, preferably in education.
3. Proven effectiveness soliciting funds and motivating others to solicit funds.
4. Experience in preparing and adhering to a budget.
5. Ability to supervise office personnel and functions.
6. Excellent oral and written communication skills.
7. A working knowledge of the Catholic faith.
8. A commitment to Catholic education.
9. Successful experience dealing with committees and boards.

Salary and Benefits:

1. Salary: [give range: $X to $X], depending on experience.
2. Benefits: Medical, dental, paid holidays, vacation, retirement.

Accountability:

The director of development will report directly to the principal.

A development committee will help guide the director and provide outreach for the development program. The committee will function in an advisory capacity to the director, board and the principal on development issues, and as a working committee actually carry out development objectives.

Timeline:

Applications to be submitted by April 7. Final decision by June 1. Position begins July 1.

Appendix C: Job Description

Sample #2

St. Ubique School
Director of Development

General: A newly established, full-time, permanent position to provide professional development leadership to a Catholic elementary school of 345 students.

Purpose of Position: To take a leadership role in the school by implementing the development activities, including the annual giving campaign, the student recruitment program, and the public relations program.

Reports to: Principal

Major responsibilities:

A. In the area of development
   1. To maintain a development office and organize all development activities
   2. To conduct an annual giving program with parishioners, parents, past parents, friends and businesses
   3. To prepare and implement the direct solicitation program
   4. To write proposals to foundations and corporations
   5. To work with the governing group and development group
   6. To research individual and corporate sources of potential donations

B. In the area of public relations and student recruitment
   1. To serve as the public relations agent for the school
   2. To promote major school events
   3. To design and implement an annual student recruitment program
      — To communicate with pre-school programs, the school community, and the parish in order to maintain and/or increase student enrollment
      — To organize and implement student recruitment activities, including Open House and other special events
   4. To develop and update promotional materials
   5. To publish the school newsletter and annual report
   6. To prepare media releases

Appendix D: Resume Evaluation Form

	Qualifications							
	Development experience	Ability to motivate	Management skills	Communication skills	Knowledge of faith	Ability to inspire confidence	Can do the job	TOTAL
Smith								
Jones								
Mays								
Wills								
Reed								
Lyons								
Hart								
Weir								

Appendix E: Application Form

St. Ubique School
Director of Development

Name:_____ Date:_____

Address:_____ Phone (day): _____

Phone (eve):_____

EDUCATION
High School:_____ City:_____

College:
Dates College Degree

_____

_____

WORK EXPERIENCE
Last 10 years, most recent first, explain gaps, use back if necessary.

Dates Employer Supervisor/Phone Salary Reason for leaving

_____

_____

_____

_____

_____

What experience do you have soliciting monetary gifts ?

_____

_____

_____

_____

What personal financial support do you provide to charities?

_____

_____

_____ _____

Other experience relevant to this job:

_____

_____

_____

Personal References:

Name	Address	Phone	Relationship

Why did you apply for this position?

_____

_____

_____

Describe the nature and extent of any physical or mental health limitations which would affect your ability to perform your duties:

_____

_____

_____

Do you have a valid driver's license? _____

Can you drive your own vehicle on school business? _____
Have you ever been convicted of a felony or had a legal finding against you for child abuse? _____

As a representative of a Catholic school, the development director must be careful to give a public example compatible with the school's ethical teachings. Incidents which undermine the school's ability to teach Catholic values may lead to termination of employment. If you have any questions on this point, please ask your interviewer.

I hereby acknowledge that all the responses I have given on this application are true to the best of my knowledge.

I also grant permission to St. Ubique School to contact any individuals, other than those I specify in writing, to ask about my past job performance and ability to do the job for which I am applying.

Signed _____ Date_____

NATIONAL CATHOLIC EDUCATIONAL ASSOCIATION
Suite 100, 1077 30th Street, N.W.
Washington, D.C. 20007-3852

(202) 337-6232